

SEMINAR SUMMARY

Fixed book prices as a policy element in a strategy on literature and language

This summary captures a two-day program of presentations and panel discussions given at the seminar “fixed book prices as a policy element in a strategy on literature and language” which took place from the 5th – 6th of March 2015 in Oslo.

The event brought together more than 60 researchers, publishers, booksellers and authors from more than 15 countries in Europe.

In the light of digitalization and globalization, new challenges and possibilities concerning cultural policies emerge. Fair competition, as well as the availability, diversity and development of literature are important issues. The aim of the seminar was to identify what we know about the effects of different policy instruments in different countries, but also examine existing research on the subject and discuss possible new initiatives for research and information sharing. Furthermore, the seminar provided a valuable networking opportunity and set the stage for further cooperation.

The seminar began with a presentation of the survey “Books – At what price? Report on political instruments in the publishing industry in Europe¹”, which includes the publishing industry in 15 European countries by 2012. Three presentations on competition in fixed book price countries today followed, considering digitalization and new international players. The fixed book price policies in France and Germany were presented next, followed by reviews on how the different parties of the book industry in different countries assess the situation as of the end of 2014. This was followed by a presentation on the state of research on publishing industry and book policies in European countries. The seminar was concluded by a panel discussion on how coordination of research and fact-finding can be improved.

¹ Written by Helge Rønning, Tore Slaatta, Olav Torvund, Håkon Larsen and Terje Colbjørnsen, Submitted to the Norwegian Ministry of Culture and the Norwegian Ministry of Education and Research 14th of February 2012

Session 1: “Books – at what price? Report on political instruments in the publishing industry in Europe”

Tore Slaatta and Helge Rønning, moderator Kristenn Einarsson

Opening the seminar, Tore Slaatta and Helge Rønning, both Professors at the Department of Media and Communication at the University of Oslo, presented their report “Books – at what price? Report on political instruments in the publishing industry in Europe”, prepared in 2012 in the context of a debate on fixed book prices in Norway.

The report offers a comparative study, and aims to describe the different regulatory regimes in Europe (between the two extremes of free book prices and fixed book price law-situations). Even though these markets are very different from one another, the book is considered different from other commodities in every market.

Secondly, the report aims to determine what kind of publishing industry structures there are. One interesting finding is that the Scandinavian publishing houses are much more integrated (the same house publishes all types of literature) than publishing houses in many other parts of Europe, which affects both the way the market is regulated and the relationship between authors and publishers. Thirdly, the report looks into distribution systems and the degree of vertical integration and concentration in the different markets. The report concludes with a discussion on the situation for authors within the different regimes.

The main findings in the report indicate that book laws is a better way to regulate the book industry (when it comes to price regulation) than agreements. This also fits with the cultural policy within the EU, contrary to trade agreements. In the choice between free and fixed book prices, it is difficult to say which system succeeds, especially if using quantitative measures. They do not differ neither when it comes to the number of books published or sold, or average prices, nor regarding industry integration or market concentration. However, free prices seem to lead to increased sales of bestsellers and lower prices for selected books, while fixed prices result in the sale of a wider range of books.

The report also looks into electronic publishing areas. There has been a significant move since 2012 in Europe and some updates are necessary, notably when it comes to electronic books and e-lending, which are two main challenges in today’s situation. However, the report shows that the most important and wide-ranging changes are taking place in academic publishing, and this is not observable in the public debates.

When it comes to the authors’ situation, the report states that the authors’ rights are threatened in Europe today. The authors of the report relate this to free book prices, open access and the free use principle. They also state that the protection of authors’ rights is better in fixed price systems than in free price systems. Secondly, the authors’ economic rights are under pressure from revisions in intellectual property legislation. Extended licensing and collective remuneration regimes are under pressure.

Session 2: How is the competition in fixed book price countries?

Øystein Foros, Jessica Sängner, Karine Nyborg, moderator Helge Rønning

Based on economic theory models, **Øystein Foros**, Professor at the Department of business and management science at the NHH Norwegian School of Economics, discussed who should decide the prices on books. The retailer decides the price in a conventional business model. In a resale price maintenance (RPM) model, it is the content provider (or the upstream firm) who decides the price. Apple's agency model is an example of the latter, which is more or less similar to the models used in fixed book price markets.

In the 1970's the main opinion was that economics of RPM harms consumers, as it was perceived as anti-competitive. Today, there is a common view that RPM may well be anti-competitive, but it may also solve coordination problems and increase efficiency. A general rule cannot decide whether RPM is good or bad; there is a need for a case-by-case evaluation.

A fundamental concept in economics says that for almost every type of goods or service, the demand curve will be "downward sloping" (the lower the price, the higher the demand). Assuming that the quality is given, you should, at least from a consumer's perspective, choose the model that gives the lowest price.

One should, Foros argues, delegate the price decision to the one (content provider or retailer) that could collect the largest total revenue, which will often be the one knowing the most about the consumer. If this is the content provider, it would probably benefit the consumer to let the content provider decide the price. Another consideration is competition – it would be detrimental for the consumer if the prices are decided by the part that has less aggressive competition.

Jessica Sängner, Legal Counsel and Deputy Head of the Legal Department at the German Publishers and Booksellers Association, gave a presentation on the current book policy situation in Germany. In 2002, a law was passed that replaced a set of mutual trade agreements that had regulated the German book market since 1888, and were conflicting with the EU regulations. Mandatory and applying not only to books, but also to e-books, music scores, maps, etc., this law was more rigid than the agreements.

The law imposes publishers to set the retail price of the product, and strictly limits the discounts possibilities; The competition within the book regulatory system in Germany can not be based on price, but Sängner holds that there is competition on other levels, such as quality, advice, delivery and ecosystem.

Further, Sängner argues that the German book law has contributed to a greater variation in titles offered, as it allows "cross subsidising" from best-selling books to other works. In addition, the author's economy is much more stable and predictable within such a system. Booksellers and wholesalers are also benefiting from the law, as the margins are guaranteed. Additionally, the law allows for a large range of publishing houses and bookshops, along with an efficient logistics system.

The German book market is still paper-dominated, with an e-book share of trade consumer market below 5 %. However, the e-commerce and the offer on e-books are considerable, with a great majority of brick and mortar bookshops operating web shops and offering e-books. When it comes to market concentration, small bookshops hold about 50 % of the market for printed books, but only 10

% for the retail e-book market (where Amazon, the biggest player, holds about half the shares). The share in turnover between bookshops and internet retail seems to be stabilizing.

One major strategy to cope with the globalization challenge has been the launch of the German alternative to Amazon's Kindle, the "Tolino Alliance", in March 2013. The "Tolino Alliance" is an open ecosystem, embracing a range of reading devices as well as an integrated cloud service and a content distribution platform. The Alliance's estimated market share is about 40 % (as is Amazon's).

Karine Nyborg, Professor of Economics at the University of Oslo and fiction writer, discussed how policy instruments can contribute to the government's goals of literature policy, which might be specified as quality, diversity and accessibility of literature, and, possibly also the writer's artistic independence.

According to Nyborg, several forces imply that an unregulated book market is expected to display substantial bestseller concentration. She argues that, even if fixed prices might be an imprecise policy instrument, it likely helps to reduce this tendency.

Nyborg states that the free market failures on securing diversity in book markets are partly due to the nature of the book, the book itself being experience/information. For a consumer to purchase the item she prefers most, she needs knowledge of the item prior to the purchase. In the case of books, this implies that the customer will rely on others' recommendations, meaning that popular books will become even more popular. Accordingly, publishers and retailers can increase their sales more easily by marketing already popular books.

Further, Nyborg argues that with economies of scale (high upfront costs, cheap to make more copies) free markets tend not to function efficiently, given their tendency to encourage price wars. With the electronic book, this is even more relevant; as nearly *all* the costs are upfront, price wars tend to push the book price to zero. Nyborg believes that fixed book prices limits the tendency of price wars, allowing more books to cover the up-front costs and thus providing more diversity.

Policy instruments helping to cover upfront costs by providing direct support to writers and publishers exist in Norway by means of the Library Purchase System. However, such systems need quality control (a committee of literature professionals selecting which books to be supported), and limiting literature policy to this single instrument would have, Nyborg argues, some important power concentration implications, and problems securing the author's artistic independence.

Session 3: Presentations about the fixed book price situation in France and Germany. Are the book laws abided, and what discussion does the fixed book prices raise?

Stephanie Kurchus, Rémi Gimazane, moderator Helge Rønning

Stephanie Kurchus, Consultant at The Boston Consulting Group in Frankfurt am Main, presented the different perspectives in Germany on fixed book prices. Within German politics there have been no serious attempt to abolish the fixed book price system. There are however, a number of challenges and an ongoing discussion on whether the law is a help or a hindrance in promoting books.

The first concerns violations and how to respond to them. The second challenge concerns the legitimization of the law. Two of the law's main objectives are protecting the diversity in publishing and maintaining a high number of sales outlets. However, as publishing houses function as any other multinational company, each title has to prove its own profit-worthiness. There are less cross subsidies, hence less diversity than before. Additionally, while small bookshops profit from the fixed price, it is the big chains and the online market places (Amazon) that will profit most as a result of the law, as a high sales volume and arranging for discounts will reap more profits. This is perceived as not consistent with the original intention of the law, and thus adds to the loss of legitimization.

The third challenge is the digital change. The main point is that the legislation has to consider that the two formats are linked to two different value systems. While printed books might have "a cultural aura" and thus deserve a protected environment, this is not the case for e-books. There is less acceptance of fixed book prices applied to e-books.

In summary, while the different perspectives in Germany on fixed book prices largely agrees on the law as a means to protect and foster bibliodiversity and book shops, the legislation should however adapt the digital change and focus on how printed books and e-books are perceived differently.

This outlook is supported by Kurchus own research on European book cultures. She recommends that together with adapting the fixed book price legislation to efficiently deal with the questions posed by the digital challenge and the changing market environment, one should remember that the instruments is limited in its usefulness as a stand-alone measure. While discussing fixed book prices, it is important to keep in mind other instruments as well, such as other market regulation mechanisms, aids to creation and publication, aids to distribution and measures to encourage consumption. When including all of these parts one can design a coherent book policy that is supported by politicians, the book industry and readers.

Rémi Gimazane, Head of the Unit of Book Economics at the French Ministry of Culture and Communication, gave a talk about the current book policy situation in France. He first presented the French book law from 1981 that only applied to printed books, before discussing the additional law on e-books passed in 2011, the 2014-additions to the 1981-law and the ongoing discussions on the subject.

The 1981-law establishes a publisher-set fixed price on books and a maximum 5 % discount limit for retailers. The law was built upon a set of cultural policy goals: 1) Equal access to the book – the same book should have the same price in every part of the country; 2) High level of cultural activity in the districts – the dissemination of bookshops ensuring a high level of activity all over the country; 3)

Diversity, both in titles published and sold, and in the retail sector. Additionally, literary quality was an argument.

The 2011-law establishes strictly fixed prices on e-books, without the 5 % discount admitted for paper books, but allowing different prices on the same book according to the circumstances (i.e. the way that the book is accessed and the use permitted). It also states that retailers (inside or outside France) must respect the fixed prices as long as they are offering e-books to buyers situated in France. The main incentive for this law was to prevent monopolies, notably from companies whose main commodity is other than books. Even if agency models were, before the law, considered as an alternative, the competition authorities questioned the ability to conserve diversity with such agreements that hinder the retailers' freedom of selection. The law was thus considered necessary.

Two laws were passed in 2014, modifying the 1981-law. The so-called "anti-Amazon-law", stated that the maximum 5 % discount should only be allowed for in-store purchases, as the online services offered systematically free shipping, a practice that was judged as causing unfair competition. The other law established the creation of a "book mediator", an independent authority whose role is to intervene in conflicts related to the fixed book price laws.

At the moment, current debates on the book industry in France cover the decreasing number of bookstores, due to online sales of printed books and changing customer habits, as well as whether the law on fixed prices on e-books covers streaming features like Kindle unlimited.

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The **discussion** that followed was moderated by Helge Rønning, Professor of Media Studies, University of Oslo, who emphasized the importance of the rights of authors and translators within a cultural policy regime. In fixed price-countries, authors' remuneration is linked directly to fixed prices. It was pointed out that other measures might have the same author-protecting function in other markets.

Ann Steiner, Associate professor in Publishing Studies at Lund University in Sweden, remarked that while a fixed price regime might bring up a better or more stable situation for national authors, this is unlikely the case when it comes to translators.

Session 4: How do the parties in the book industry assess the situation?

Introduction by Fran Dubruille (F), panel with authors, booksellers and publishers, moderator Trond Andreassen

Opening the session, **Fran Dubruille**, Director of the European & International Booksellers Federation, emphasized that each market is different, and that individual policies for each and one of them is needed. As the Federation has members from both fixed and free price markets, their point of view is neutral. Their ambition is to draw their member's attention to the particularities of their own markets to base their policy upon these, but of course also encourage them to exchange experiences with the other countries. Further, Dubruille highlighted the fact that the customer will not see the difference whether he is in a fix or free price market; service is most important for the customer in both markets.

Kjell Bohlund, former CEO of the Norstedts Publishing Group and former chairperson of the Swedish Publishers Association, presented the current situation in Sweden, where the trade book market has been shrinking since 2007 in terms of sales, after more than ten years of rapid growth.

Responding to this situation, the industry does not ask for fixed prices or important government measures to support the book industry. Instead they ask for moderate updates on the current system, that in brief is more focus on reading in the schools, legal protection against piracy and semi-illegal breach of copyright, the same VAT on e-books as on printed books (6 %) and support for the direct grants to publishers for quality literature.

For the readers, the situation is quite good with a growing number of books published, no sign of deterioration in quality and low book prices. For the industry – publishers and retailers - it is a challenging situation but the general view is that regulations would make books less attractive for the consumers. The major competition is external, from other products and services and from the international market.

Stephane Kurschus, Consultant at The Boston Consulting Group in Frankfurt am Main, stated that the e-book market has not grown as fast as originally anticipated. People tend to go back to the brick-and-mortar shops, which may be due to a "buy local"-trend, but also a professionalization of the bookstore industry.

Rémi Gimazane, Head of the Unit of Book Economics at the French Ministry of Culture and Communication, made a brief comment on the market situation in France, especially regarding e-books. The market has been stable for some years, with a slow decrease of about 2 % per year. The e-book market remains quite low, with a share of about 4 % of the total sales. Online sale accounts for about 18 %. Supermarkets have suffered from the development of online sales more than bookstores.

When it comes to the industry associations' current priorities, the booksellers have prioritized lobbying in order to have more policy measures for independent bookstores and measures to enforce the law in the 2011-2014 period; they are now focused on professionalizing independent bookstores to ensure better competitiveness, especially against online sales. The publishers focus on the copyright question, prior to the upcoming European copyright legislation reform.

Jessica Sanger, Legal Counsel and Deputy Head of the Legal Department at the German Publishers and Booksellers Association, gave a short brief on the book policy regimes in Austria and Germany. The Austrian fixed book price system is quite similar to the system in Germany. Two changes in the fixed book price law came into force on December 1st, 2014: Extending the scope of the law to e-books and cross border online sales.

In Germany, the industry associations are lobbying for the same extension of the German law to include cross border sales. In order for the current German law to apply to a cross border sale, they have to make a very clear case that it is a deliberate circumvention of the fixed price. It would be important to be able to apply it to cross border sales without having to make that case. Further, Sanger stated that the Transatlantic Trade and Investment Partnership (TTIP) is of concern to the German Publishers and Booksellers association, because it could endanger fixed book price if seen as a “non-tariff barrier to trade”.

Janne Rijkers, legal advisor at the Dutch Writers Guild, gave a brief overview of the recent history of the book policy regime in the Netherlands. Fixed prices on books used to be regulated through trade agreements between publishers and booksellers. However, as these agreements proved to be violating European and national competition laws, the book prices have been regulated by the Act on Fixed Book Price law since 2005. This law has been subject to two evaluations, both leading to the conclusion that it should be maintained. The main reason for this conclusion was that the Dutch book market was not prepared for the digitalization and would be overruled by foreign retailers if the fixed book price was to be discarded.

Further, Rijkers emphasized the importance of the fixed book price for professional authors for two main reasons. Without the fixed book price many books would not have been published. Moreover, the model contracts between authors and publishers state that the author receives a percentage of the fixed selling price of the book (minus taxes), a system that is indissolubly attached to the fixed price system.

Myriam Diocaretz, Secretary-General of the European Writers’ Council, explained briefly the EWC’s priorities, which are the defense of copyright in the imminent review of the EU legal framework, and the possible introduction and implementation of an EU instrument on contractual agreements. Referring to the report “books – at what price”, Diocaretz stressed its strengths and importance and welcomed the statement on the need to protect the whole value chain. Further, she emphasized that there is a need for more cultural policy studies, indicators and figures on practices in the text and publishing sector, as well as on the writing and reading domains.

Moreover, Diocaretz emphasized the importance of taking the challenges following from the digitalization of the book seriously, as the lower prices of e-books affect the whole value chain and authors directly. One of these challenges are the intervention of Amazon in the European markets, and their patent for the “sale of used digital objects” which would also apply to e-books. Additionally, she mentioned the possible exceptions for libraries for access to educational resources, and for the remote lending of digital books or e-books without licensing, but through an exception. The EWC is therefore in search and in support of models and solutions for remote lending of e-books by libraries that allows a balance between access to works for readers and e-readers, and fair remuneration for authors and relevant stakeholders.

Arvydas Andrijauskas, Chairman of the Board of the Ltd. AL holdings², briefly summarized the situation in the Lithuanian book market, before giving a short status on the newly started discussion

² Manages a network of bookshops, publishing house and more companies.

on fixed book prices. Since the Lithuanian book market commenced 25 years ago with the fall of the Soviet Union, the country now holds about 450 publishing houses, with 3000 new titles published yearly. The retail market is concentrated with two main bookstores chains dominating the book retail trade, and the number of independent bookstores declining. 20 % of the sales go through supermarkets, and 6-8 % through online retailers. E-books represents 1 % of the book market, but there is, he holds, important piracy activity, so the real e-book market is actually higher. Most of the new published books are translated.

The book prices in Lithuania are free, and the discussion about fixed book prices has just started. Andrijauskas argue that fixed book prices would improve the situation for small independent bookshops in small towns as well as the situation for publishers who are publishing non translated Lithuanian literature. Further, he argues, fixed book prices would be a good instrument to control big discounts on new titles, which he consider being the major threat to the market today. However, he emphasized that there are uncertainties regarding how fixed book prices could be applied to imported books, and how they would affect sales to libraries and schools.

Henrique Mota, as a representative of the Portuguese Publishers Association (APEL), stated that the free book price law in Portugal has not been fully respected in the recent years by some (relevant) stakeholders. APEL developed efforts to encourage the government to enforce and update the law and developed relevant efforts to organize a consensus among the stakeholders. The Publishers' Association were informed that the government decided to start the process of revising the law (possibly including new editions and e-books, on the one hand, and a strict list of infringements and an update of the penalties, on the other hand).

Mota raised and stressed the inconsistency between the existence of a free book price law and the nonexistence of a similar (parallel) fixed commercial discount law. These aspects should be considered in parallel. He argues that this situation imposes severe distortions in the market, stressing the differences among small, medium and big enterprises, and ignores the interests of the publishers (and indirectly of the small bookstores); as one way of preventing the infringement of the law is not affording the big and powerful chains with disproportionate margins.

Argyris Kastaniotis, Publisher at Kastaniotis Editions and representing the Association of Greek Publishers and Booksellers, gave a brief presentation of the Greek fixed book price law. The law was implemented in 1997, and since 2010, it also apply to e-books.

In 2014, an amendment was adopted that narrows the price protection to apply only to the first print run, or the first two years following the first edition (by the 1997-version of the law, there were fixed prices on books for two years after its last edition). By the 2014-amendment, the law only applies to literary and children's books. The maximum discount allowed is 10 %. The retailer can in some circumstances raise the retail price by a maximum of 5 %, in order to cover transportation costs.

Research done in the late 2000's indicates that the fixed book price law in Greece has contributed to slow down the growth in book prices (lower than average consumer price index). The slow increase of book prices has helped strengthening the competitiveness of the book among other educational and cultural goods.

However, since 2014, the fixed book price situation in Greece is threatened by the recent changes in the law, and some booksellers are engaging in price wars without facing consequences. The new government of 2015 has expressed willingness to reinstate the fixed book price law at its previous formulation.

Miha Kovac gave a short overview of the fixed price law in Slovenia: The law applies to both printed books and e-books (with an exception for schools and libraries), and with a fixed prices-period for only six months. The law was implemented in order to slow down the supermarkets' and (and expected Amazon's) rapid gain of more and more dominant market positions.

Angus Phillips, Director of the Oxford International Centre for Publishing Studies and Head of the School of Arts at Oxford Brookes University, made a brief survey of the market situation in the UK, where they have had free book prices for twenty years. Fixed book prices are no longer an issue, Phillips holds. There is however, a cultural policy with no VAT on printed books, and some support for writers and publishers of, for example, poetry. Further, Phillips argues that the market is healthy, with a high level of diversity in publications and low consumer prices.

Nevertheless, some disadvantages are there. There are few independent booksellers left in the UK, and 40 % of the sales of printed books happen through online retailers. While publishing still is profitable, bookselling is not. Fixed book prices may, Phillips argues, preserve diversity on the bookseller level.

Christine Bødtcher-Hansen, Director of the Danish Publishers Association, made a brief presentation of the book policy regime in Denmark. Having had fixed prices on books since 1837, this has been gradually reduced since 2006, and free prices were fully and formally imposed 1.1.2011. Since 2007, the Danish book market has been decreasing, and in 2013 a new discussion on fixed book prices arose, resulting in a definitive defeat. This defeat, Bødtcher-Hansen argues, was partly due to an absence of data supporting the case, as well as a lack of support from the "people". The current focus point for the book industry in Denmark is copyright-issues, and concerning the fixed book prices there is no way back, she holds.

Tore Slaatta made a comment as for updating the "books – at what price"-report. Most of the observations holds, and the main point is that there is no way back if you go for free book prices. Some generalizations can be done: The older the (fixed price) law, the more sustainable it is, as it has been creating its own context for a long time. The larger the country/the market, the more sustainable the law is. When it comes to the outcome of the fixed book price, it tend to slow down some of the concentration tendencies, and it makes national players more able to position themselves.

Session 5: Panel presentation on the state of research in European countries

Angus Phillips, Miha Kovac, Adriaan van der Weel, Ann Steiner and Tore Slaatta, moderator
Kristenn Einarsson

Angus Phillips, Director of the Oxford International Centre for Publishing Studies and Head of the School of Arts at Oxford Brookes University, gave a presentation on his research on the book as a medium. Phillips defines the following key drivers in book publishing industry: authorship, readership, copyright and book publishing.

The digitalization, as an important part of this ecosystem, changes how these key drivers works: There is an important democratization of the authorship, with new channels (as blogs, social media, mobile storytelling, self-publishing) taking place outside the professional publishing system, which also changes the relationship between author and publisher. The copyright is pressured from both consumer expectations (users find it acceptable to download content for free), technology companies (such as Google), governments (fair use) and the fact that the digital market is global.

The readership has also changed from the digitalization, with important competition from other media, such as streaming providers for films and tv series, but also with different reading habits, such as reading from the web and linear digital reading.

When it comes to publishing industry information in the UK, there are data form publishers, producers and distributors, retail data (from Nielsen) and consumer surveys. What remains unexplored are digital sales data (Amazon does not share) and information about what is happening outside the traditional industry (self-publishing, books without any isbn number, etc.).

Miha Kovac, professor at the Department for Library and Information science and Book Studies, School of Arts, University of Ljubljana, made an overview of what kind of data is available on the following three main research areas in publishing studies: Book industry and book markets, reading habits and reading technology, social, cultural and technological context of publishing.

Kovac stresses that the available data both on the book industry and the book market (such as number of titles available, turnover, exports) do not suffice in order to give a good picture of the situation. For instance, data from Amazon are lacking, which makes it impossible to measure the e-book market and the market share of English books in continental Europe.

When it comes to market structures they are concentrated in most markets, and in Eastern Europe this equals vertical integration, which is more common in small and/or less developed book markets. Another important trend, he argues, is that English reading is growing in Europe. However, we do not know how important it is, neither how fast it is growing.

Further, Kovac defined some key questions for future research: How useful is benchmarking? What is the impact of libraries on book sales? What is the impact of changing reading technologies? How is reading in English changing publishing and overall cultural landscape?

Adriaan van der Weel, professor of Modern Dutch Book History at the University of Leiden, explained about the book data situation in the Netherlands, where there are effectively large

structural data sources on market statistics, book trade logistics, leisure time spending and library statistics, but with different levels of availability.

The market statistics carried out by the bureau GfK for the different book sellers and trade associations contains information on sales, turnover, average price (by genre and channel and on printed vs e-books) and bestsellers. This data is available for principals and their members and for researchers. Annual aggregates are available for the public.

Consumer research is carried out on a regular basis by the GfK, on behalf of several public and commercial organizations, and includes information on reading, buying and borrowing behavior. The information is available for the public after three months. The GfK also does some research on its own initiative, notably on the subject of trends in digital media.

The logistics service provider CB carries out data on book trade logistics such as titles ordered, availability and points of sale (number and geographic distribution). These numbers are highly confidential. However, the CB also provides data on printed vs e-titles both on sales and on availability available for the public.

Additionally, there are some incidental sources of data, such as GfK consumer research and sales and market shares in academic and higher education.

Ann Steiner, associate professor in Publishing Studies at Lund University in Sweden, presented briefly her latest work, which concentrates on bestsellers and its cultural meaning and place in society, and bookselling. In regards to the latter; one main interest is to compare historical situations, such as the introduction of book clubs and the beginning of sales of physical books in online stores, with the e-books introduction case. The preliminary findings show the following similarities: It is not as radical as we may think, but some players will not be able to maintain their market shares. The new technology might reach new readers, but most likely not.

Further, Steiner asked the question who should actually decide what research should be done, and how. As the different stakeholders are interested in knowing different aspects of the subject, researchers should not be too involved, she argues. Policy makers, both organizations and authorities, demand more research. However, it can be difficult to use the research properly when making policies since there is too much ideology. Additionally, the funding bodies for researchers often require that the research should be done in a way that differs from the policy makers' demand (for instance national versus international focus).

Tore Slaatta, professor and Dr.polit. at the Department of Media and Communication at the University of Oslo, presented very briefly one of his main interests in research: cultural policy context in the meeting with digitalization and globalization. Further, he mentioned the current research project "art and power", where he compares the situation for artists in different fields (how they interpret their situation in the frame of the globalization, etc.). Slaatta holds an interest in combining the social science and the humanity perspectives, translating statistics into a less industry oriented research context, giving a sociological perspective on cultural production.

Session 6: How can research and fact finding be coordinated in a better way in the future? Panel discussion.

Angus Phillips (UK), Miha Kovac (SL), Adriaan van der Weel (NL) and Ann Steiner (SE), moderator Tore Slaatta

Tore Slaatta introduced the session by asking the panelists what future research on publishing industry and culture policies should be focused on, whether there is a need for change of focus and if anything should be done collectively. There was consensus in support of the idea of continuing as a network. The discussion should not only concentrate on fixed book price regimes, but on market regulations as a whole, as well as on digitalization and globalization issues.

Ann Steiner pointed out the problem that there is a lack of good data on authors and readers. Researchers in other fields than publishing studies, for instance researchers on literature, book history and sociology, should be more involved, as they might have the data that is lacking in the publishing studies field. The information concerning the number of titles published, turnover etc. exists, Steiner argued – we should now try to complete the picture. Several of the panelists pointed out, however, that a European portal or dashboard of basic data on the publishing industry and/or on digitalization issues could be useful.

Adriaan van der Weel made a remark on the fact that we are talking about books as being part of the “creative industry”, and argued that this point of view is hardly advantageous – we should preserve the point of view that books are of a different nature and relate it to the importance of reading.

Tore Slaatta asked whether fixed book prices cause better data and/or a bigger demand for good data. In Slovenia, the fixed book price law has improved the data available to the industry because of the establishment of a national register of newly published books. **Kristenn Einarsson**, director of the Norwegian Publishers Association, stated that market regulation causes a greater demand for data, since the trade organizations within such a system would feel obliged to produce facts for researchers, journalists, politicians and others.

Ann Steiner mentioned that numbers on import seems difficult to obtain in every market. The Swedish publishers and booksellers associations did an attempt to describe the import field, with a new industry statistics model. However, with players such as Amazon that are not willing to share data, measuring e-reading, e-book sales or e-book distribution becomes very difficult. Einarsson stated that we should combine data from different sources, for instance consumer panels, and attempt to see the whole picture.